Chapter 2

Managing Positions

Chapter Overview

Introduction

This chapter contains information for managing positions in the database. It includes procedure steps for retrieving, validating, quick copying, as well as correcting and updating encumbered and unencumbered positions. It also outlines how to terminate and delete positions. Instructions for managing positions in position hierarchy are discussed in this module in Chapter 3.

Chapter Contents

See Also

Module 2, Position Management and Classification Using the Modern DCPDS
- Chapter 1, Building Positions
- Chapter 3, Managing Position Hierarchy
  - Linking a Position to a Position Hierarchy

Module 1, Fundamentals of the Modern DCPDS
- Chapter 6, Retrieving Records

Module 3, Processing Requests for Personnel Actions Using the Modern DCPDS

Module 4, Staffing Using the Modern DCPDS

Continued on next page

Querying Positions

Purpose

This section guides you through the querying options for retrieving previously built positions and verification of whom occupies the positions.

Section Contents

- Accessing the Position Window
- Querying All Positions in the Database
- Querying a Specific Position
- Verifying Who Occupies the Position

Before You Begin

Examples of when you will use this procedure:
- You start to build a position, but get interrupted before you validate it.
- You want to quick copy a position in the database.

You can query on the **Position** Window by clicking any of these data fields:
- ***Name***
- ***Job***
- ***Organization***
- ***Location***

Accessing the Position Window

Step	Action
1	From the **Navigation List** → *Work Structures* → *Position* → *Description* → <**Open**>.
2	The **Position** Window displays.

Continued on next page

Querying Positions, Continued

Querying All Positions in the Database

Step	Action
1	**Note**: Do **not** click in the ***Name*** data field if you want to retrieve position(s). Clicking in the ***Name*** data field brings up the **Position** Flexfield and generates a new system number in preparation for building a new position. Click **<u>Q</u>uery** → **Run** on the Main Menu Bar or F8 to look at all positions in the database. The Message Line at the bottom of the window indicates there is a <List>. 
2	Scroll through the positions with the up or down arrow keys until you reach the position you need. To see how many positions were retrieved, click **Query** → **Count Matching Records**.

Querying a Specific Position

Step	Action
1	On the **Position** Window, click **<u>Q</u>uery** → **<u>E</u>nter** or F7. With the cursor in ***Name*** data field, enter ***PD Number***. Ex: %DH12345% *OR* use the following querying options to query the following position**:** **JI124. SUPPLY TECHNICIAN.2746.ARMC.APPR**. Options: **By PD #**: JI124% **By Title**: %.SUPPLYTECHNICIAN% **By Seq Nbr**: %.%.2746% **By Agency Group**: %.%.%.ARMC% **By Appropriation Code**: %.%.%.%.APPR% **CAUTION: By Seq Nbr** may display more than one position on the same sequence number.

Continued on next page

Querying Positions, Continued

Querying a Specific Position (continued)

Step	Action
2	Click **Query** → **Run** or F8. The ***Date***, ***Name*** (*PD Nbr, Title, Servicing Personnel ID, Agency Group*, and *Position Type*); ***Organization***; ***Location*** (GEO-LOC); ***Job*** and ***Status*** automatically populate on the **Position** Window.
3	If you want to edit or make changes to any of the position's flexfields, click <**Others**> and continue until all changes are made. Click **Save** on the Toolbar.
4	If you want to query another position, use the same **Position** Window and follow the steps outlined above.

Verifying Who Occupies the Position

Step	Action
1	To verify who encumbers the position, click **<Occupancy>** at the bottom of the **Position** Window. The **Position Occupancy** Window displays showing current or past incumbent(s), with beginning and end dates for each. This window is a folder and columns may be rearranged and saved for your own view.
2	To **Exit**, click **Action** on the Main Menu Bar and click **Close Form** to return to the **Navigator** Window.

Validating an Invalid Position

Purpose

This procedure shows how to validate an invalid position and change the status to "valid".

Note: Only validated positions can be used with the RPA.

Section Contents

- Querying the Invalid Position
- Validating the Position
- Making Corrections if the Position does Not Validate

See Also

In this module, review:

- Chapter 1, Building Positions
- Chapter 2, Managing Positions

Before You Begin

- When building or changing position data in the **Position** Window, the status of the position is "Invalid" until all required data is entered and all business rules are met.
- When you click <**Validate**>, the system applies business rules that check the data for errors and inconsistencies. For example, if the Grade and FLSA designations are not compatible, an error message will appear. You must then correct the information and validate the position.
- When validating a previously built invalid position, you will need to use one or more of the following unique position identifiers to retrieve the position:
  - Sequence Number
  - Date information was entered
- Once the position is "Valid," remember to link it to the position hierarchy. (See Chapter 3 in this module)
- After you validate the position, you can use it when processing position-related RPAs.

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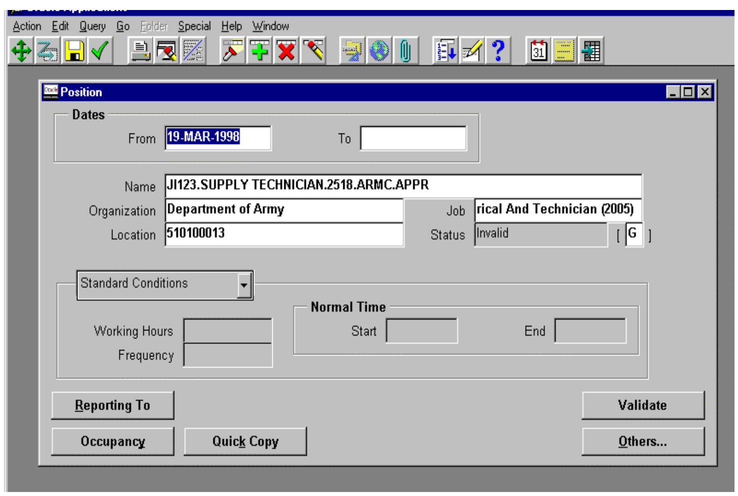
Validating an Invalid Position, Continued

Querying the Invalid Position

Step	Action
1	On the **Navigation List** → *Work Structures* → *Position* → *Description* → **<Open>**.
2 	The **Position** Window displays. **Note:** Do **not** click in the ***Name*** data field. It will bring up the **Position** Flexfield and generate a new system number.
3	Click **Query** → **Enter** on the Toolbar or F7. Put your cursor in the ***Name*** data field, and enter a PD number. Ex: %JI123%
4	Click **Query** → **Run** on the Toolbar or F8. The ***Date***, ***Name*** (*PD Nbr, Title, Servicing Personnel ID, Agency Group, and Position Type*); ***Organization*** (*Department of Army*); ***Location*** (*geo-loc*); ***Job***; and ***Status*** automatically populate on the **Position** Window. 

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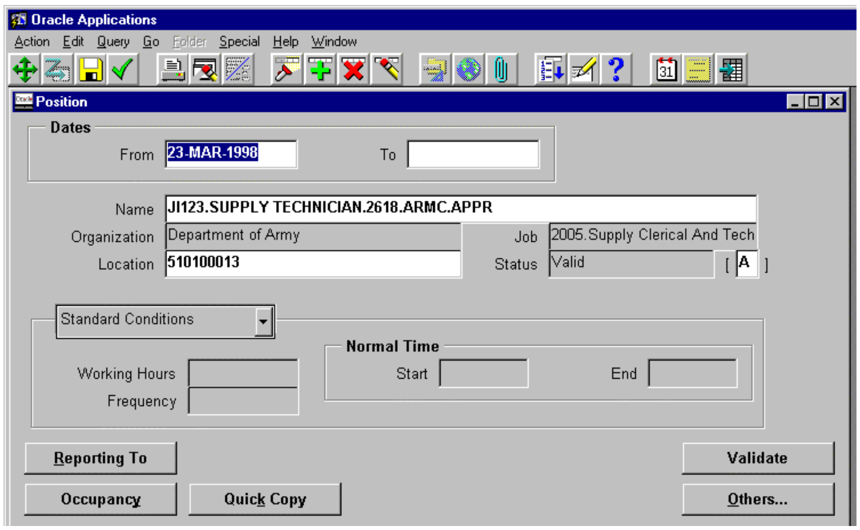
Validating an Invalid Position, Continued

Validating the Position

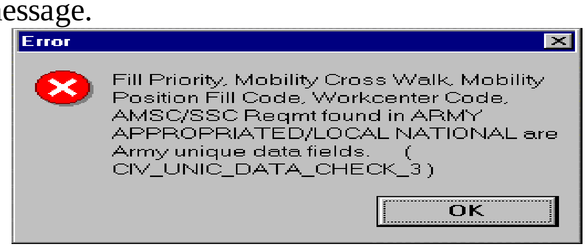
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Once you have located the position and you are in the Position Window, click <Validate>. If there are no inconsistencies or errors in the position, the <i>Status</i> data field changes from “Invalid”to “Valid.”



</td></tr>
<tr><td>2</td><td>Click Save on the Toolbar.</td></tr>
</table>

Making Corrections if the Position Does Not Validate

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>If the position doesn’t validate, you will receive a Dialog box with an error message.



</td></tr>
</table>

Continued on next page

Validating an Invalid Position, Continued

Making Corrections if the Position Does Not Validate (continued)

Step	Action
2	Click <**Others…**> on the **Position** Window. Retrieve the flexfield(s) and make corrections. As a convenience, the <**Validate**> Taskflow Button also appears on the **Extra Information** Windows. If you change the information in these flexfields, you can choose <**Validate**> to simultaneously save your changes and validate the data.
3	Click **Save** on the Toolbar.
4	Click **Action** → **Close Form** on the Main Menu to exit the form and return to the **Navigation List**.

Quick Copying a Position

Purpose

This procedure shows you how to Quick Copy up to five copies of a validated position.

Section Contents

- Querying the Position to Copy
- Making Job or Organization Changes
- Modifying and Quick Copying
- Using Cut and Paste Method for Querying
- Validating the Quick Copied Position (s)

See Also

In this Module, review:
- Chapter 1, Building a Position
- Chapter 2, Managing Positions

Module 1, Fundamentals of the Modern DCPDS
- Chapter 6, Retrieving Records

Before You Begin

- If you are making a Quick Copy of a position, you need to know how to retrieve it. It must also be a valid position. On the **Position** Window at the ***Name*** field, query the position using one or more of the following unique position identifiers:
  - PD Number
  - Sequence Number
- You will need to validate each position that you Quick Copy.
- You can Quick Copy:
  - Similar positions and make the minor changes needed before validating.
  - An encumbered or vacant position.
  - Other "Quick Copied" positions.

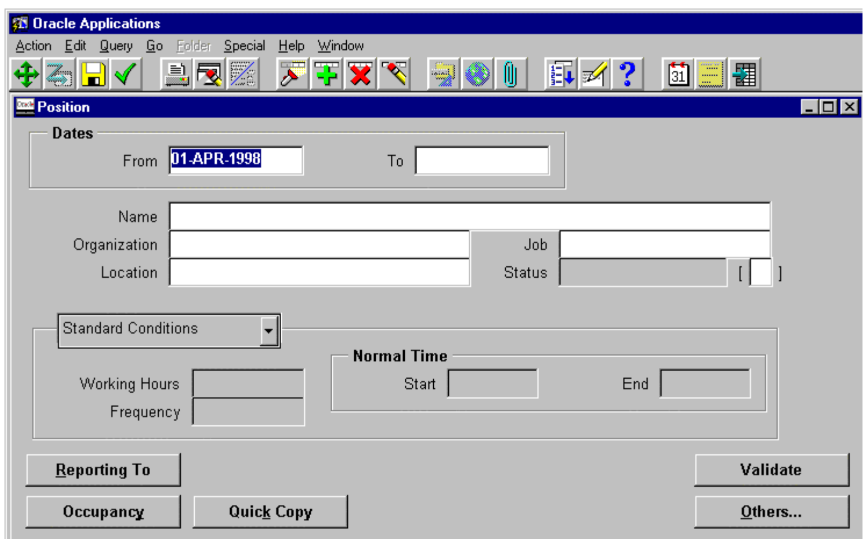
Querying the Position to Copy

Step	Action
1	On the **Navigation List** → *Work Structures* → *Position* → *Description* → <**Open**>.

Continued on next page

Quick Copying a Position, Continued

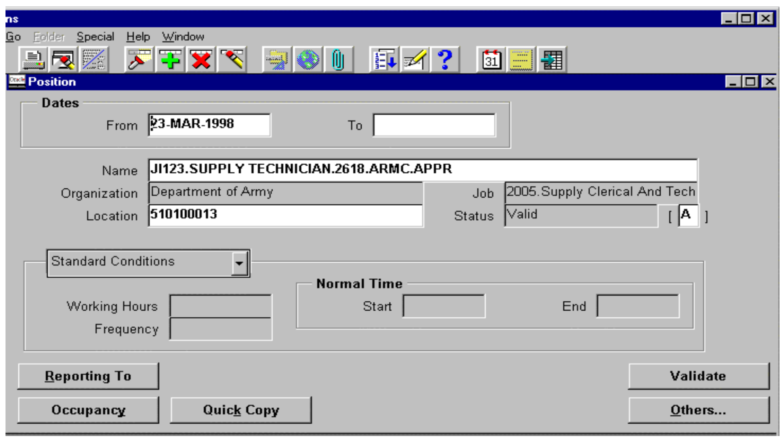
Querying the Position to Copy (continued)

Step	Action
2	The **Position** Window displays. The cursor is located in the ***From*** data field and the current date is highlighted. The data fields for ***Name***, ***Organization***, ***Location***, and ***Job*** are white. The data field for ***Status*** is grayed out. There are four Taskflow Buttons: **<Reporting To> -** not used in these steps. **<Occupancy> -** not used in these steps. **<Quick Copy> -** used later in this process to quick copy. **<Validate> -** used later in this process to validate. **<Others> -** not used in these steps. 
3	On the Toolbar, click **Query** → **Enter** on the Toolbar or F7.
4	Place the cursor in the ***Name*** field and enter the name of the position you want to Quick Copy (or enter a partial value preceded and followed by the % sign).

Continued on next page

Quick Copying a Position, Continued

Querying the Position to Copy (continued)

Step	Action
5	Click **Query** → **Run** on the Toolbar or F8. The ***Name***, ***Organization***, ***Job Location***, and ***Status*** fields are automatically populated with the information of the position you want to Quick Copy. 
	Note: If the ***Location*** data field is white, the position is **not** occupied. If the information is incorrect and not occupied, it may be deleted by clicking the **Red X** and **Save** on the Toolbar.

Continued on next page

Quick Copying a Position, Continued

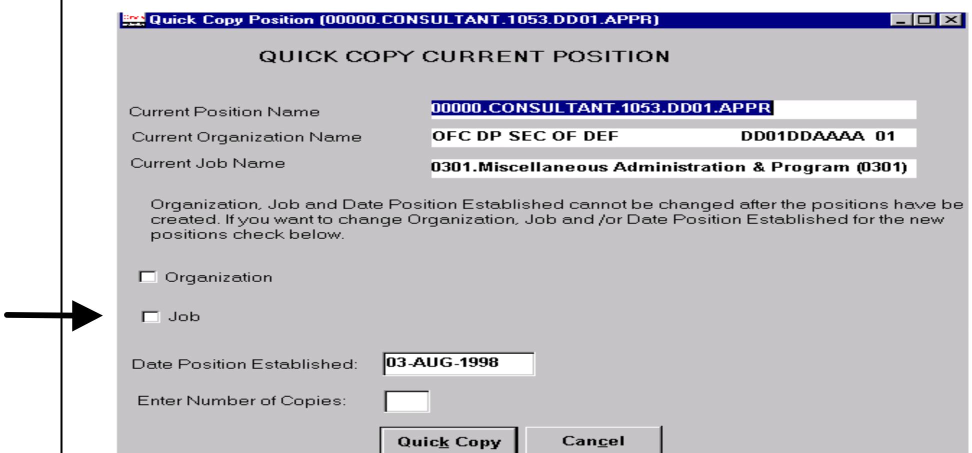
Modifying and Quick Copying

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

Click the <**Quick Copy**> Taskflow Button. The **Quick Copy Position** Window displays. This window lists the ***Current Position Name***, ***Current Organization Name***, and ***Current Job Name***.

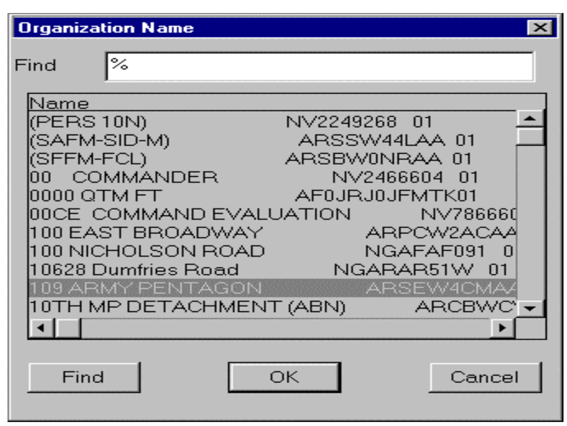
The three check boxes are Organization, Job, and Date Position Established. A field to ***Enter Number of Copies*** is also on the window. An alert window advises you to check the appropriate boxes if Organization and/or Job need to be changed for the new position(s).

<**Quick Copy**> and <**Cancel**> buttons are at the bottom of the window:



</td></tr>
<tr><td>2</td><td>Click the Organization checkbox.</td></tr>
<tr><td>3</td><td>

The **Organization Name** LOV displays. Select a new organization and click <**OK**>.

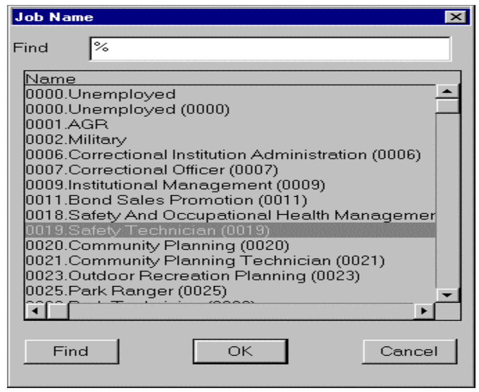


</td></tr>
</table>

Continued on next page

Quick Copying a Position, Continued

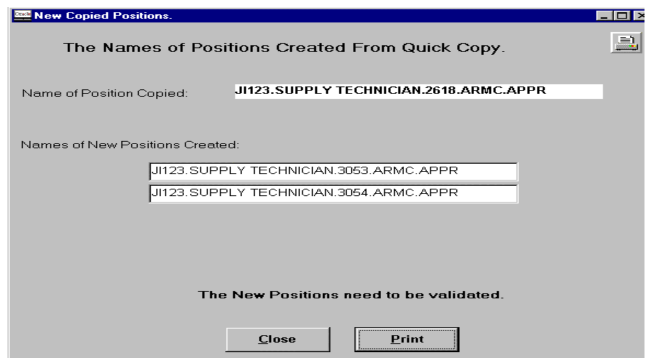
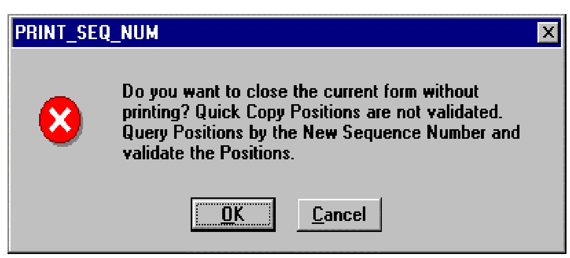
Modifying and Quick Copying (continued)

Step	Action
4	The **Quick Copy Position** Window displays again. Click the **Job** checkbox. The **Job Name** LOV displays. Select a new Job Name and  Click **<OK>**.
5	The **Quick Copy Position** Window displays again. Enter the number of copies (between 1 and 5) you want to make. **Note:** If you click **<Cancel>**, the system returns to the original **Position** Window. You can retrieve another position if this is not the one you want to copy.

Continued on next page

Quick Copying a Position, Continued

Modifying and Quick Copying (continued)

Step	Action
6 	Click <**Quick Copy**>. A **New Copied Positions** Window displays. It lists the ***Name of Position Copied*** and ***Names of New Positions Created***. **Note:** A message at the bottom of the window alerts you that the new positions need to be validated. **<Close>** and <**Print>** buttons appear below the validation statement. If you click: • <**Print> --** the system prints the **New Copied Positions** Window. • <**Close> --** the system returns to the **Position** Window. 
7	A **PRINT_SEQ_NUM** Dialog box displays if **Print** is clicked. The message asks you if you want to close the current form without printing. It reminds you that the Quick Copy positions are not validated and instructs you on how to validate them (i.e. query positions by new sequence number). Two buttons are on the Dialog box: • **<Cancel> -** Returns to the **New Copied Positions** Window. • **<OK> -** Returns to the original **Position** Window. Click **<OK>**. 

Continued on next page

Quick Copying a Position, Continued

Methods to fill in Data

On the **New Copied Positions** Window, use one of the following three methods to fill in the query data on the **Position** Window.

METHOD 1	METHOD 2	METHOD 3
Close Method	**Print Method**	**Cut & Paste Method**
Click <**Close**>. A Print Message displays.	Click the Printer Symbol in the top right hand corner. A hard copy reference of the window is printed. Or, click <**Print**>. A print message displays. Click <**OK**>.	Place the cursor at the end of the first position string in the **Names of New Positions Created** data field.
Click <**OK**>. The **Position** Window displays with the original position.	Exit the window and return to the **Position** Window with the original position.	"Left" click the mouse and highlight back to the beginning of the field. Leave the cursor in the highlighted field.
Use **Query** or **F7** and place the cursor in the **Name** Field. Enter the **PD #** and **Sequence Nbr**, i.e., (0000%.%.338.%).	Use **Query** or **F7** and place the cursor in the **Name** Field. Enter the **Sequence Nbr**, i.e., (0000%.%.338.%).	"Right" click the mouse and click **COPY** on the pop-down menu.
When the record populates with the correctly copied position, click <**Validate**>.	When the record populates with the correct copied position, click <**Validate**>.	Click <**Close**>. A Print message displays. Click<**OK**> and return to the **Position** Window.
Click **Save** on the Toolbar.	Click **Save** on the Toolbar.	Use **Query** → or **F7** and place your cursor in the ***Name*** data field. Right click the mouse and click **Paste**. The new-copied position populates.
	The **Status** is changed from "**Invalid**" to "**Valid**".	If you made more than one copy, replace the last two digits of the **Sequence Number** with a % sign.
		This allows you to validate the first position. Click **Save** on the Toolbar.
		Arrow down to display the next position(s) to validate; continue through all the copied positions until all are "**Valid**" and saved.

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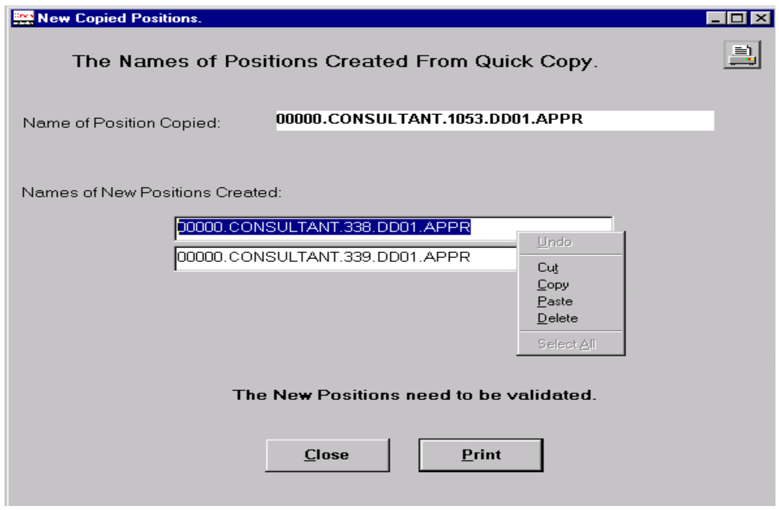
Quick Copying a Position, Continued

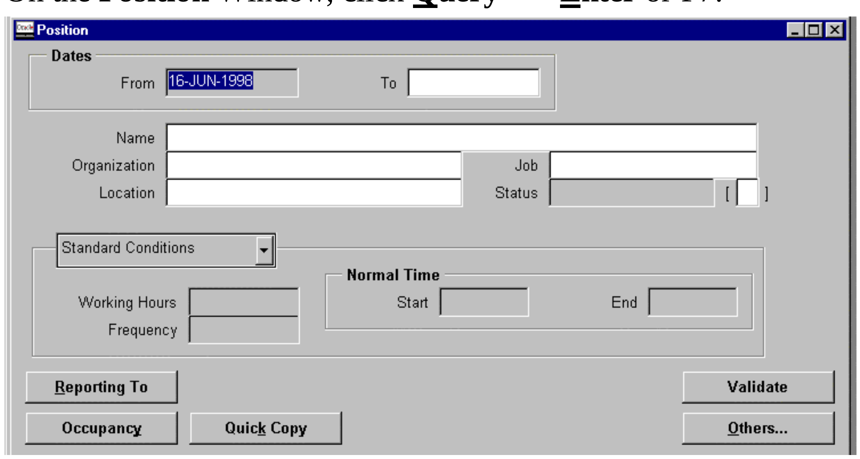
Cut and Paste Method for Querying More Than One Position

The "**Cut and Paste**" (Method 3 above) is the most expedient method for querying and validating, if you have copied more than one position. The following is an example of the highlighted-copied position and drop-down menu resulting from clicking on the right mouse button.



Validating the Quick Copied Position(s)

Step	Action
1	On the **Position** Window, click **Query** → **Enter** or F7.



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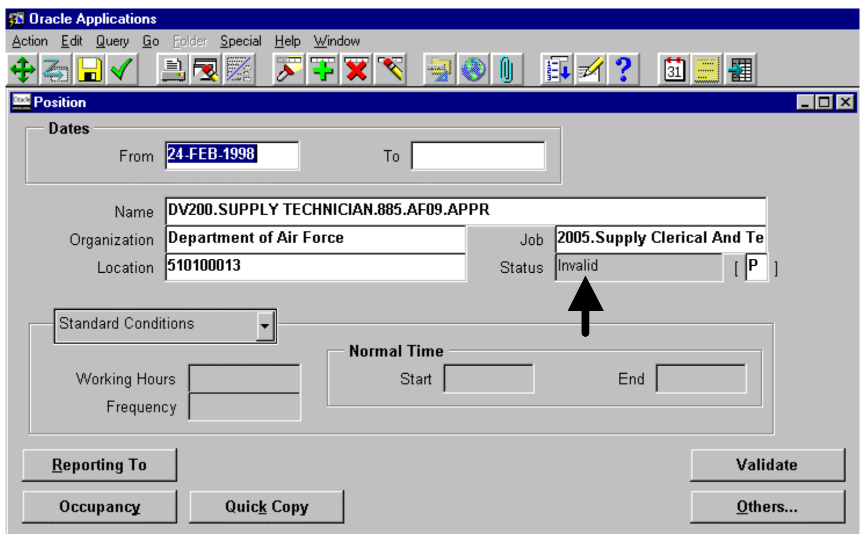
Quick Copying a Position, Continued

Validating the Quick Copied Position(s) (continued)

Step	Action
2	Place your cursor in the ***Name*** field and enter the name of the position you want to validate.
3	Click **Query** → **Run** or F8. The ***Name***, ***Organization***, ***Job***, and ***Location*** fields are automatically populated with the information of the position you need to validate. The ***Status*** field displays as ***Invalid***. 
4	Click <**Validate**>. The status field changes to ***Valid***.
5	Click **Action** on the Main Menu.
6	Click **Exit Oracle Applications**.
7	Click **<OK>**. You are returned to the **Navigation List**.

Querying Position Information from the RPA

Purpose

This procedure guides you through the steps for retrieving a list of the positions in your database using the **RPA Appointment** Window.

Information Displayed

The following items display on the list:

- Position Title
- Occupied (Yes/No)
- Pay Plan
- Occ Series
- Grade
- Organization Name
- Position Number
- Position Sequence Number
- Agency Code/Sub Element

Section Contents

- Accessing the RPA
- Using the RPA Appointment Window to Retrieve Position Information

See Also

Module 2, Position Management and Classification Using the Modern DCPDS
    Chapter 2, Managing Positions
Module 3, Processing Requests for Personnel Actions
    Chapter 1, Processing a Request for Personnel Action

Before You Begin

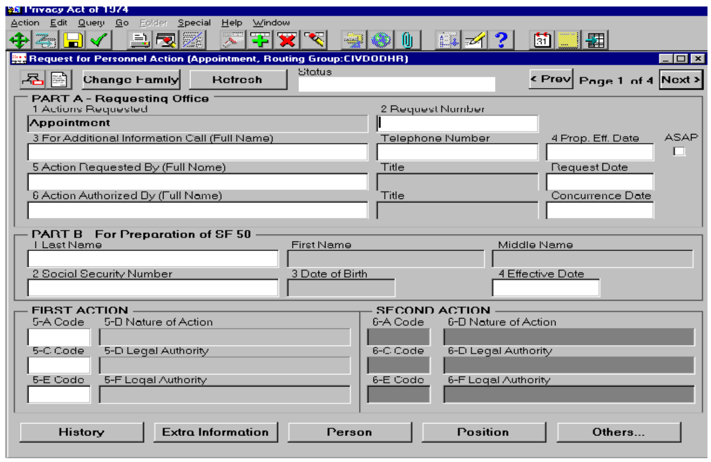
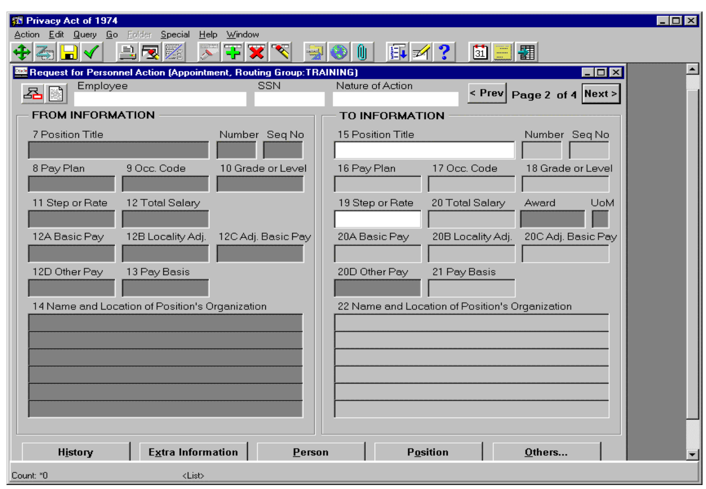
This method of retrieving position information would normally be used for appointing someone to a position. It is being provided in this section as a handy tool to access the position information in your database by **Position Title**.

Note: You can also access the rest of position flexfields by clicking the <**Position**> Taskflow Button on the RPA Window.

Continued on next page

Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigation List → Request for Personnel Action → Appointment → <Open>. This will display the RPA-Page 1 Window.</td></tr>
<tr><td>2</td><td>The RPA – Page 1 Window displays.
Click <Next> to access page 2.

</td></tr>
<tr><td>3</td><td>The RPA- Page 2 Window (Page 2 of 4) displays. The cursor defaults to Position Title data field. Click the LOV on the Toolbar.

</td></tr>
</table>

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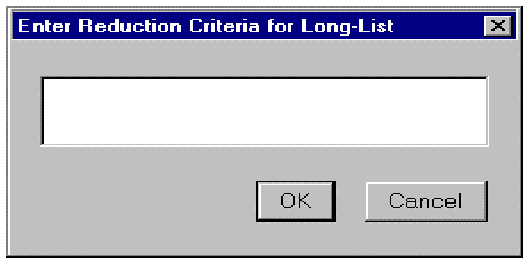
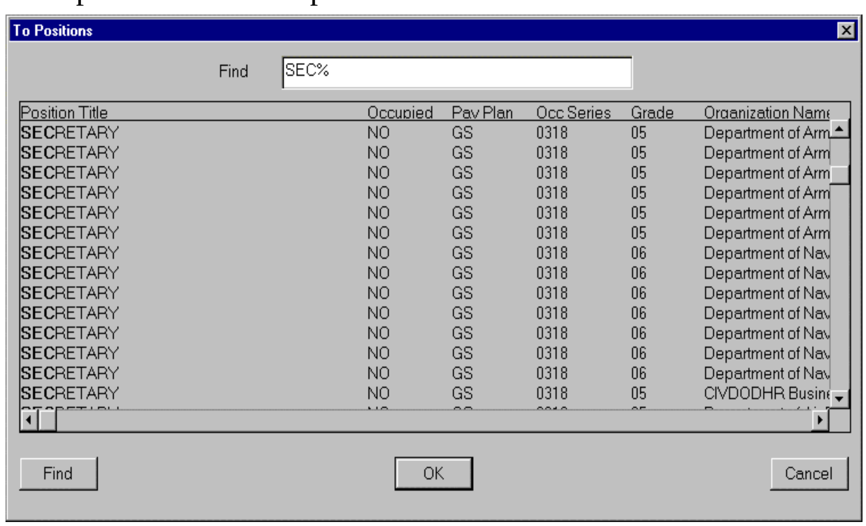
Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title (continued)

Step	Action
4	The Enter **Reduction Criteria for Long-List** Window displays. Enter the first few characters of the title of the positions you want to view, i.e. “Sec” for Secretary or enter a **%** sign to view all positions in your database. Click <**OK**>. 
5	The **To Position** LOV displays. **Example:** The following is an LOV retrieved by entering “Sec” (for Secretary Positions) in Step 3 above. It displays in three parts to show complete content. 

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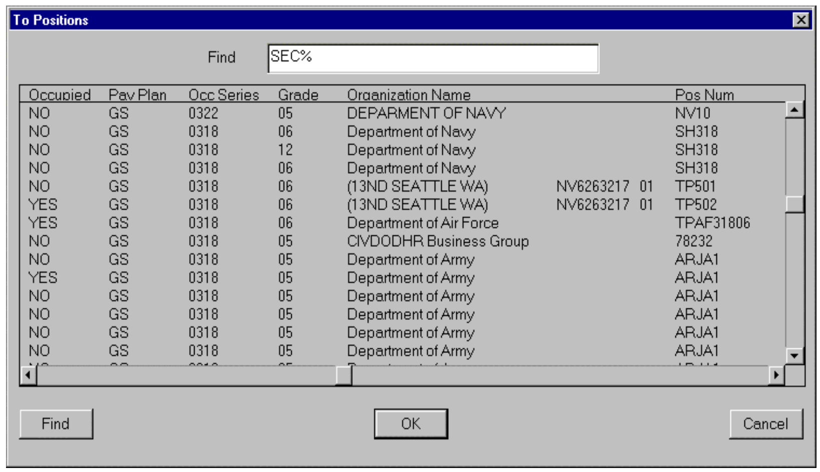
Querying Position Information from the RPA, Continued

Retrieving Position Information by Using Position Title (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Use the bottom scrollbar to view all the information in the list, in addition to Position Title, i.e., Occupied (Yes/No), Pay Plan, Occ Series, Grade, Organization, etc.

</td></tr>
<tr><td>7</td><td>Follow this decision logic table to proceed.</td></tr>
<tr><td></td><td>
<table>
<tr><th>If you do <u>not</u> want to view a specific position:</th><th>If you <u>want</u> to view a specific position:</th></tr>
<tr><td>Click Cancel and exit the RPA Window, by clicking <u>A</u>ction on the Main Menu then click <u>C</u>lose Form to return to the Navigation List.</td><td>• Click the position you want to retrieve.
• Click <OK>.
The RPA Window displays with the <i>Position Title</i> and <i>Position Data</i> filled in.
To view more information:
• Click <Position>.
The modified Position Window displays.
• Click the Descriptive Flexfield ([ ]) and click <Others…> to see the Extra Information Flexfields.</td></tr>
</table>
</td></tr>
</table>

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Changing Unencumbered Positions

Purpose

This section guides you through the steps for changing unencumbered positions that have never been occupied. You **"correct"** data if the change is made on the same day as the effective date. You **"update"** data if the change is effective after the effective date.

Section Contents

See Also

Module 1, Fundamentals of the Modern DCPDS
    Chapter 4, Dated Information and Date Tracking
Module 2, Position Management and Classification Using the Modern DCPDS
    Chapter 1, Building Positions
    Chapter 2, Managing Positions
        Sections
            Querying Positions
            Terminating and Deleting a Position
            Quick Copying a Position
            Changing Encumbered Positions

Correcting and Updating Position Data

If you are correcting or updating position information, you need to take into consideration these situations and timeframes:

	Timeframe	**Timeframe**
Situation	**And, it's the same day, then…**	**And, it's a later date, then…**
Erroneous information was entered while building a position **Example:** FLSA was initially entered incorrectly.	Retrieve the position and override the data.	Retrieve the position, use the **Alter Effective Date Button** and enter the effective date (the date you built the position). **<u>Correct</u>** the FLSA data by overriding the erroneous data in the position record.

Continued on next page

Changing Unencumbered Positions, Continued

Correcting and Updating Position Data (continued)

	Timeframe	Timeframe
Situation	**And, it's the same day, then…**	**And, it's a later date, then…**
A change occurs to the data that was entered after the position was built.	Retrieve the position and override the data	Retrieve the position, Use the **Alter Effective Date Button** and enter the effective date (date the information becomes in effect, or valid). **"Update"** the data by changing the data in the position record. **CAUTION:** If you don't reset the date, the next action you take will be effective on the altered date of your last action.

Before You Begin

Caution:

- You should carefully evaluate each data item before changing a position.
- Before making any changes, consider **end dating** or **deleting** and build a new position.

Examples: **End Date** ends the record on the date you enter in the ***To*** data field on the **Position** Window. From that date forward, this end date displays in the ***To*** data field.

Deleting removes any history of the record and can only be accomplished on a position that has never been occupied.

Information about locations, organizations, jobs, positions, grades, pay tables, and other work structures is referred to as "**dated"** information as opposed to **"DateTracked'** information used with employee actions. Dated information is maintained in the database to keep a history of actions over time. Previous versions of the position record may be viewed through the use of the **Alter Effective Date** button on the Toolbar.

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Changing Unencumbered Positions, Continued

Before you Begin (continued)

- Changes to the position record are accomplished through the use of the ***From*** and ***To*** Dates on the **Position** Window :
  - The ***From*** Field is used to show when the date the position becomes effective (or the date established).
  - The ***To*** Field is used to assign an **end date** when you terminate a position.

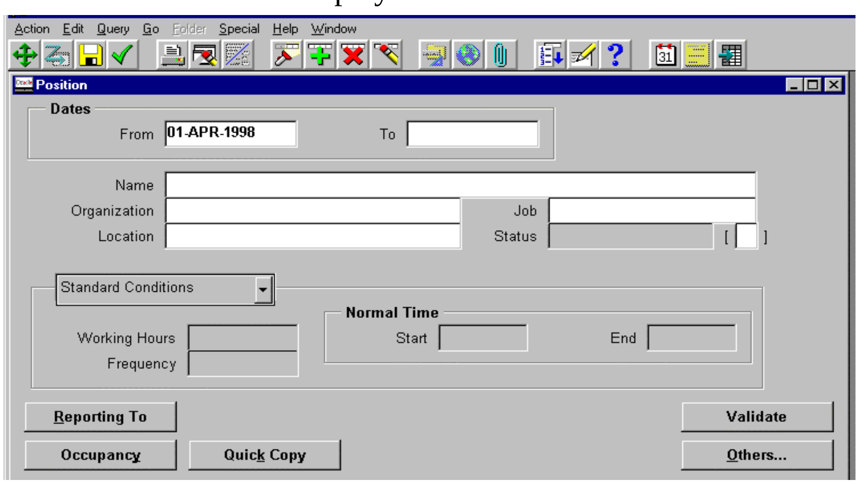
Notes:

- The ***From*** and ***To*** Fields are not subject to **DateTrack.** The period you enter in these fields remains fixed until you change the values in either data field. There is no **DateTrack History** for position records.

To change "protected data" (assigned organization and job - occupational series) you may use **Quick Copy**. Check the appropriate block to change (organization or job) on the **Quick Copy** Window prior to creating the new position. Otherwise, once a position is created, this becomes protected data and cannot be changed.

Accessing the Position Window

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Navigation List → <i>Work Structures</i> → <i>Position</i> → <i>Description</i> → <Open>.</td></tr>
<tr><td>2</td><td>The Position Window displays.



</td></tr>
</table>

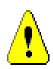
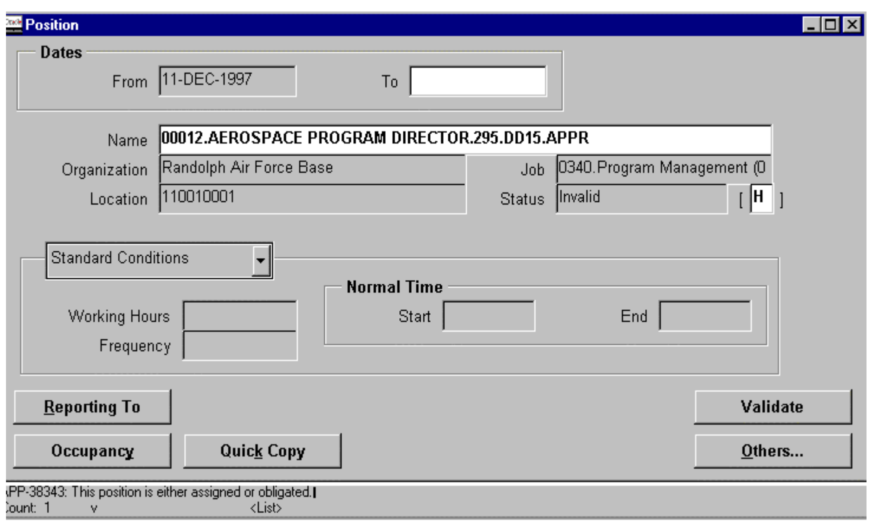
Continued on next page

Changing Unencumbered Positions, Continued

Accessing the Position Window (continued)

Step	Action
3	On the **Position** Window, click **<u>Q</u>uery** → **Enter** on the Toolbar or F7. With the cursor in the ***Name*** data field, enter **%** sign to see all positions. On the Toolbar click **<u>Q</u>uery** → **<u>R</u>un**. The **Position** Window displays the position in the database with the fields populated. The Message Line displays the count or number of positions. Using the up and down arrow keys, scroll through the positions until you locate the one you want to modify.

Correcting or Updating Position Data

Step	Action
	**Caution:** • If the Message Line of the ***Position*** Window says "This position is either assigned or obligated," do **<u>not</u>** proceed with your changes. You must return to the **Navigation List** and follow the process for **Changing Encumbered Positions**. • If the Message Line is blank, proceed with your changes. **Example:** 

Continued on next page

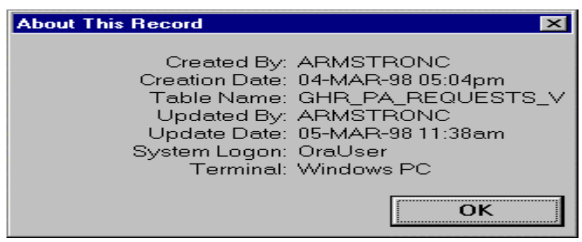
Changing Unencumbered Positions, Continued

Correcting or Updating Position Data (continued)

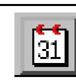
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Notes:

- If you want to verify who encumbers the position, click the **<Occupancy>** Taskflow Button. The **Position Occupancy** Window displays. This folder shows current or past employees with beginning and ending dates for each. Close the window to return to the **Position** Window.
- If you want to see information about this position, i.e., Who created the position? When it was created, when and who updated it, etc., click **Help** on the Main Menu Bar and click **About This Record**.



</td></tr>
<tr><td>1</td><td>

Click the **Alter Effective Date** button 

if you want to change the **From** date. The **Alter Effective Date** Window displays.

</td></tr>
<tr><td>2</td><td>Enter the new date and click <OK>. The new system date displays at the top of the Position Window and in the From data field.</td></tr>
<tr><td>3</td><td>Click <Others>. Continue the steps in Building a Position to access related descriptive flexfields and key flexfields until all data fields are completed.</td></tr>
</table>

Continued on next page

Changing Unencumbered Positions, Continued

Correcting or Updating Position Data (continued) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>After completing the last Extra Position Information Flexfield Window, click Save on the Toolbar.
Click <Validate>.</td></tr>
<tr><td>5</td><td><table>
<tr><th>If the Position…</th><th>Then…</th></tr>
<tr><td>Doesn’t Validate</td><td>You receive a dialog box with an error message. Retrieve the necessary flexfield(s) and make corrections.
After correcting, click Save and click <Validate> on the Extra Information Flexfield to save your changes and validate the data.
Position Window displays “Valid” in the Status Box.</td></tr>
<tr><td>Validates</td><td>The Status Box on the Position Window shows “Valid.”</td></tr>
</table></td></tr>
</table>

To Exit

Click **Action** on the Main Menu Bar and click **Close Form** to return to the **Navigation List**.

Caution: If you changed the effective date for this position change, you must reset the date before proceeding to another action.

Changing Encumbered Positions

Purpose

This section guides you through the process of changing position data on encumbered (occupied) positions. The information in this section applies to the following kinds of position change situations:

- Change an encumbered (filled) position – first incumbent (occupant).
- Change an encumbered position – additional past incumbent(s).
- Change a vacant position with past incumbents.

Section Contents

- Process Definition
- Who Changes Position Information
- Business Rules
- Examples of Changes Generating an NPA
- Requirements for Changing Specific Data Elements
- Accessing the RPA
- Illustration of Change in Data Element (NOA 800)
- Illustration of Change in Duty Station (NOA 792)
- Example of Using the Position Window in Work Structures
    - Accessing the Position Window
    - Querying the Position
    - Changing Competitive Level

Regulatory References

US OPM, The Guide to Processing Personnel Actions (GPPA)

See Also

Module 2, Position Management and Classification Using the Modern DCPDS

Sections,

Building a Position
Querying Positions
Building a Position Hierarchy
Quick Copying a Position
Changing Unencumbered Positions

- Module 3, Processing Requests for Personnel Action Using the Modern DCPDS

Continued on next page

Changing Encumbered Positions, Continued

Process Definition

- Position data elements that appear on **the Notification of Personnel Action (NPA)** cannot be changed on the **Position** Window. They must be processed through the **RPA** using the appropriate **Nature of Action Code (NOAC)**. For example:
    - ***Position Work Schedule*** **-** Use the RPA and NOAC 781.
    - ***FLSA*** **-** Use the RPA and process FLSA change in conjunction with appointment or placement action; or, as NOAC 800, Change in Data Element
- Refer to the OPM GPPA to determine the correct NOAC to use for various actions affecting the information on an NPA.
- Position data elements that **do not** appear on the NPA can be changed in two ways, either:
    - On the **RPA** Window using the **Position** Taskflow Button to access the **Position** Window (be sure to datetrack to the date the updated position information takes effect)

      Or
    - In ***Work Structures*** using the data field on the **Position** Window.

Who Can Change Position Information

- Component policies and business rules determine who is assigned this responsibility.
- Position data is usually modified at Regional Service Centers (RSCs) by personnelists given the responsibility. Modification of position data is not done at Customer Service Units (CSUs) or by line managers outside of the civilian personnel community. However, the need to make changes to position data can come from officials in serviced organizations, which may have new workloads, mission changes, or other circumstances that require that positions be modified.

Continued on next page

Changing Encumbered Positions, Continued

Business Rules

- You cannot **delete** positions that are encumbered.
- To cancel an encumbered position, the position must be end-dated (to accurately maintain assignment history), and the employee separated or moved to another position.
    - If the end-date is a **future date**:
        - You can add or change this date while the employee continues to encumber the position. If the employee continues to encumber the position once the end-date has passed, you will receive a daily alert to move the employee from the position.
    - If the end-date is a **current** or **past date**:
        - The incumbent must be moved from the position before the position can be end-dated.

Examples of Changes Generating an NPA

The following position changes are examples of actions that must be done via the RPA for encumbered positions, because they require production of an NPA.

Nature of Action (NOA)	RPA Position Actions	Process Definition
781	Change in Work Schedule	A change in the work schedule or time basis on which an employee is paid, including change between seasonal and non-seasonal work schedules.
782	Change in Hours	A change in the total number of hours during that day that a part-time employee is scheduled to work.
792	Change in Duty Station	A change in an employee's official duty station or work site.
800	Change in Data Element	A change in ***Bargaining Unit Status***, ***FLSA Category***, ***Personnel Office ID***, ***etc.***

Continued on next page

Changing Encumbered Positions, Continued

Requirements for Changing Specific Data Elements

Data Element	Associated Requirements
JOB	Modern DCPDS will not allow the “**Job**” (the occupational series) assigned to a position to be changed once a position is created and saved. When a position is encumbered, an NPA will always be required to move the employee to a different position. The NOA will vary depending upon the circumstances. Refer to the GPPA.
ORGANIZATION	For vacant or encumbered positions, the position can be realigned through Mass Actions, with **NOA 790 Realignment** *Or* If organizational information is updated on the **Organization** Window, that information will automatically “flow” to all of the positions in the organization. **Note:** OPM does not require that such a change be documented with a personnel action NPA, but neither does it prohibit such documentation.
LOCATION	The duty location of the position must be identical with that of the assignment of the employee who encumbers the position. **Note:** OPM requires that a change in position/assignment location be documented with a personnel action with NOA **792 -Change in Duty Station**, if no other changes occur simultaneously. A list form of the NPA may be used if the change affects a large number of employees/assignments.
VALID GRADE	Changes in ***Grade***, ***Pay Plan***, *or* ***Pay Basis*** in an encumbered position always require an NPA.

Continued on next page

Changing Encumbered Positions, Continued

Before You Begin

- The primary sources of information for position data changes are the RPA and the position description.
- Once in the RPA, the **Position** Window is the same as the one used in ***Work Structures*** to build a new position except <**Extra Information**> Taskflow Button has been added. Three Taskflow Buttons (<**Occupancy**>, <**Quick Copy**>, and **<Others>**) are not available. The buttons and fields on the **Position** Window are described in the procedure steps of **Building a Position** in this module.
- If the position is moving to a new organizational location, the new **Organizational Hierarchy** must be established before you can move the position.
- If you wish to change a position after you build it, and the position is being used on an RPA, you will need to **alter the effective date** of the RPA action to make your position change. Otherwise, the RPA will not recognize the change.

Note: Remember to reset the **alter effective date** back to the current date before proceeding with another action.

Caution: You should carefully evaluate each data item before changing a position.

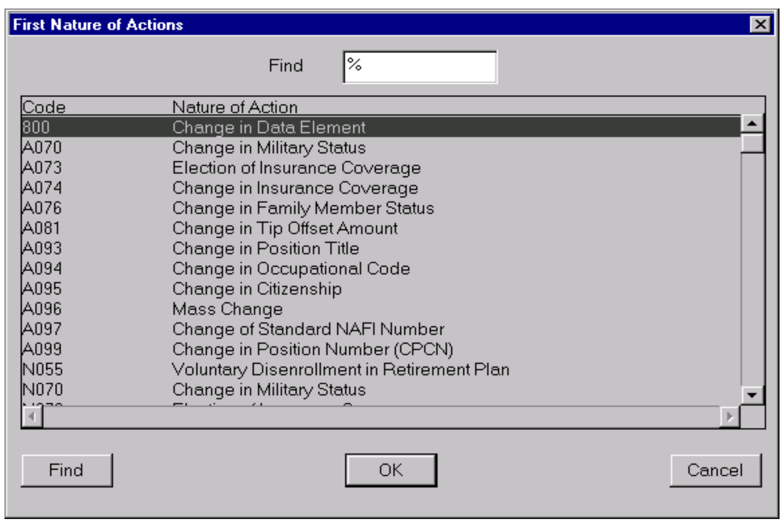
Continued on next page

Changing Encumbered Positions, Continued

Accessing The RPA

Follow this path to access the RPA. On the **Navigation List** → *Request for Personnel Action* → *Change Actions* → *Change in Data Element* → <**Open**> to display the **RPA – Page 1** with the selected action listed in the ***Actions Request*** data field.

Illustration of Change in Data Element (NOA 800)

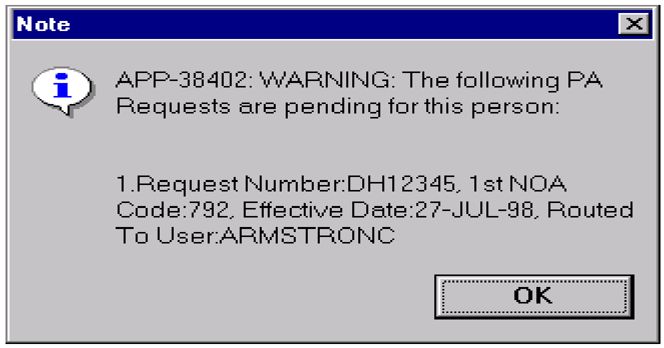
Step	Action
1	Use the procedures listed in Module 3, Request for Personnel Action, Chapter 2, Completing the RPA to complete Page 1 of the RPA.
2	With your cursor in the First Action Region of ***5-A Code*** data field use the LOV on the Toolbar to display the **First Nature of Actions** Window. Click the correct Nature of Action and click <**OK**> to automatically populate the data field on page 1. 

Continued on next page

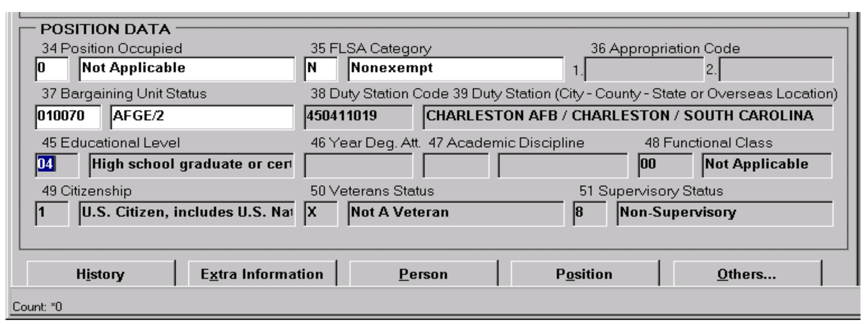
Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>If an action is pending on the employee, this message will display.



Click <OK>.</td></tr>
<tr><td>4</td><td>Click <Next> until you are on the page that contains the data element that you need to change. For example, <i>Bargaining Unit Status</i> on page 3. Click the LOV on the Toolbar to display a listing, click the correct code, and click <OK> to automatically populate the data field.

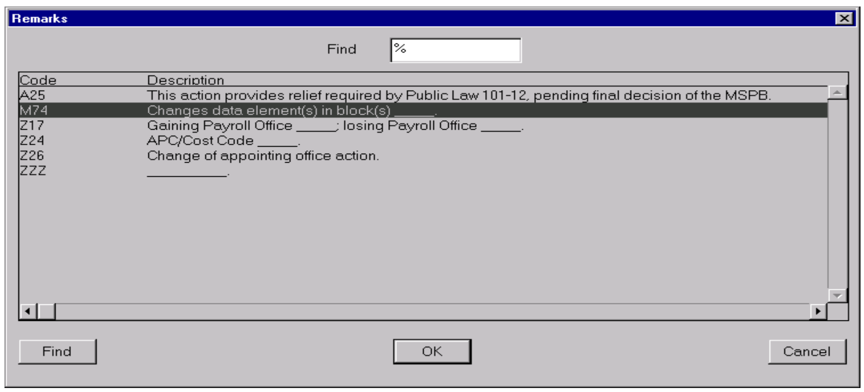

</td></tr>
</table>

Continued on next page

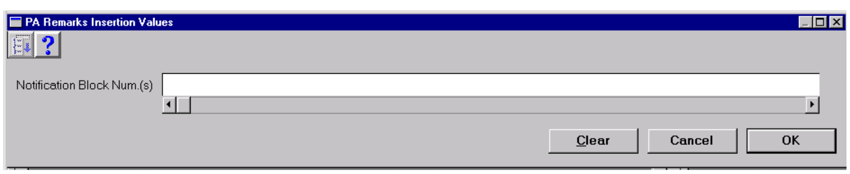
Changing Encumbered Positions, Continued

Illustration of Change in Data Element (NOA 800) (continued)

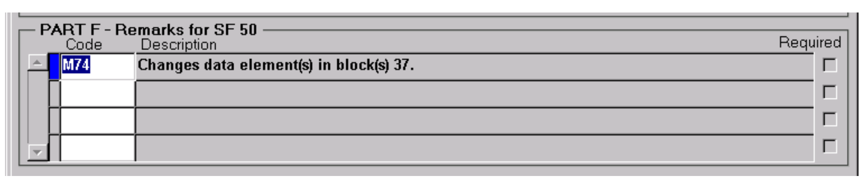
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click <Next> to display Page 4 of the RPA. In Part F – Remarks for SF-50 Region, place your cursor in the <i>Code</i> data field. Use the LOV on the Toolbar for a listing of appropriate codes for the NOA that you have selected.



Click <OK>.</td></tr>
<tr><td>6</td><td>The PA Remarks Insertion Values Window displays. Enter the information example: “37” in the data field. Click <OK>.



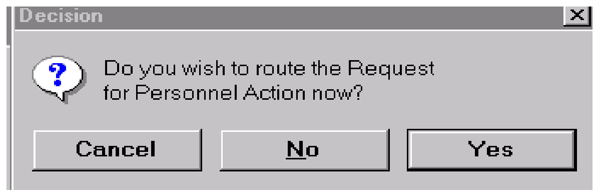
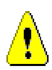
Click <OK> to automatically populate the data field.


</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

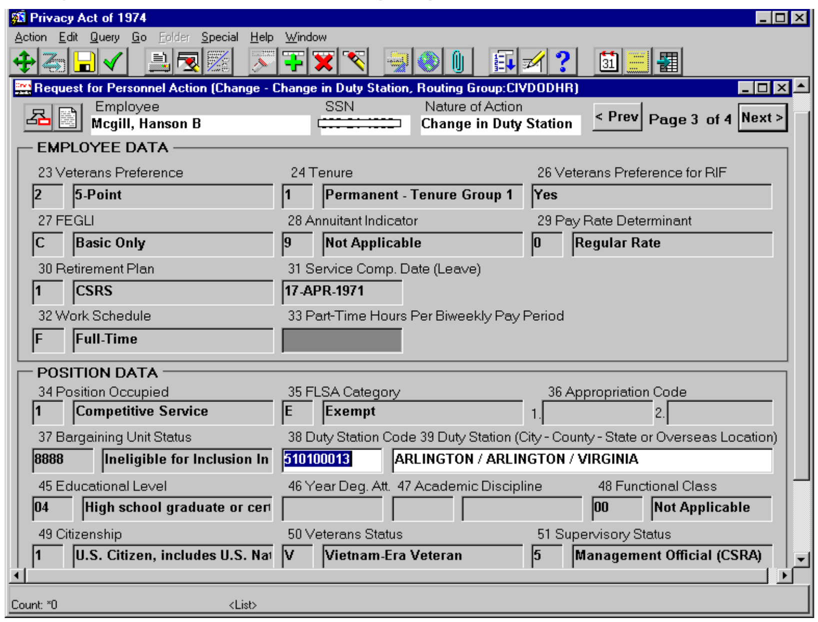
Illustration of Change in Data Element (NOA 800) (continued)

Step	Action
7	Click the Save  button on the Toolbar. A decision message displays. 
8 	Click <**Yes**> and use the LOV to route the action to the correct Approving Official's Workflow Inbox. After everyone in the routing group has given approval, the last one will submit to **Update HR**. **Caution:** The RPA must be saved to your inbox prior to Updating HR. If not, you will <u>not</u> be able to locate it when you query closed actions in the future.
9	The **Message Line** indicates the change is saved and displays at the bottom of the **RPA – Page 4**. 
10	To Exit, Click **<u>A</u>ction** on the Main Menu and click **<u>C</u>lose Form** to return to the **Navigation List**.

Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792)

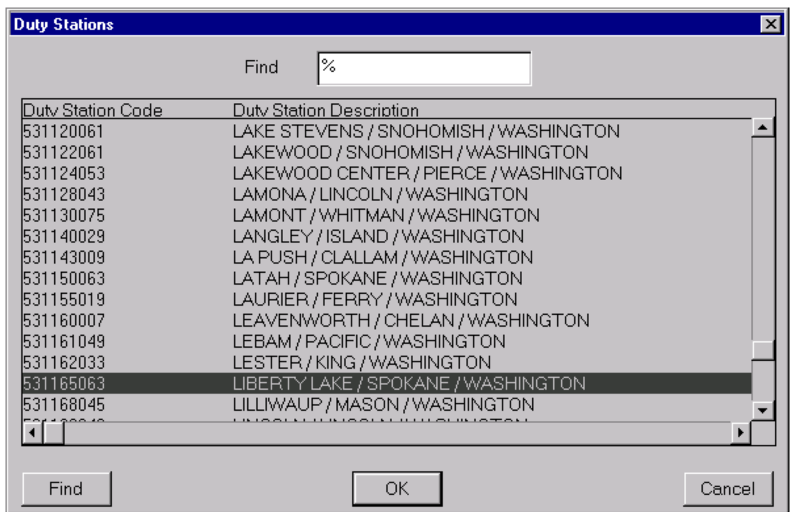
Step	Action
1	On the **Navigation List** → *Request for Personnel Action* → *Change Actions* → *Change in Duty Station* → <**Open**> to display the **RPA – Page 1** with the selected action listed in the ***Actions Request*** data field. Use the procedures listed in Module 3, Processing Requests for Personnel Actions Using the Modern DCPDS, Chapter 1, Processing a Request for Personnel Action to complete Page 1 and Page 2 of the RPA. Also, follow the procedures listed in Change of Data Element (NOA 800). Click <**Next**> to display page 3.
2	The ***Duty Station*** data field is highlighted.  **Note:** The ***Bargaining Unit Status (BUS)*** data field may have to be changed along with ***Duty Station*** data field.

Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792) (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Place your cursor in the <i>Duty Station Code</i> data field. Click the LOV on the Toolbar for a listing of Duty Stations. You may need to use the reduction criteria (or %) to limit the number of duty stations. Click the new duty station and click <OK> to automatically populate the data field.

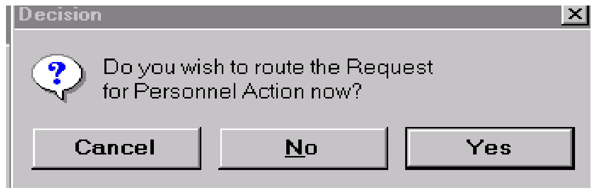

</td></tr>
<tr><td>4</td><td>The Duty Station Code and Duty Station (City-County-State or Overseas Location) data fields are now changed.

Note: You may get a message that locality pay has changed as well.</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

Illustration of Change in Duty Station (NOA 792) (continued)

Step	Action
5	Click **Save**. A decision message displays. 
6	Click <**Yes**> and use the LOV to route the action to the correct Approving Official's Civilian Inbox. After everyone in the routing group has given approval, the Approving Official will submit to **Update HR**. **Caution:** The RPA must be saved to <u>your</u> Civilian Inbox before processing to Update HR. If not, you will <u>not</u> be able to locate it when you query closed actions in the future.
7	The Message Line indicates the change is saved and displays at the bottom of Page 4 of the RPA. 
8	To Exit, click **Action** on the Main Menu and click **Close Form** to return to the **Navigator** Window.

Continued on next page

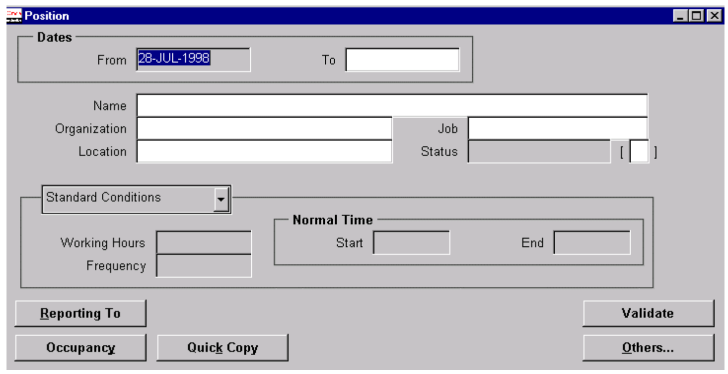
Changing Encumbered Positions, Continued

Accessing the Position Window

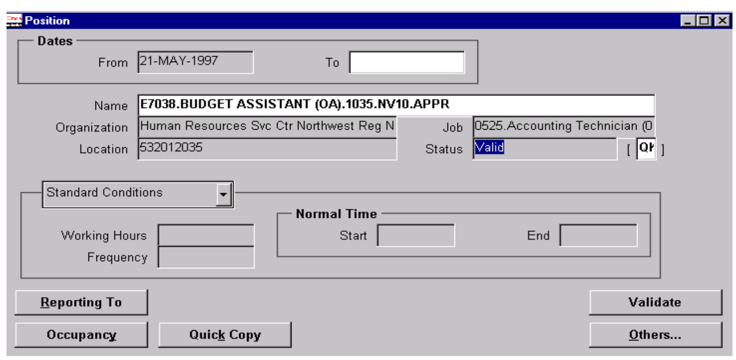
On the Navigation List → *Work Structures* → *Position* → *Description* → **<Open>**. The **Position** Window displays.

Querying the Position

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Do not move your cursor at this time from the Name data field.



</td></tr>
<tr><td>2</td><td>Click <u>Q</u>uery → Enter on the Main Menu or F7. With your cursor in the <i>Name</i> data field, enter a partial PD Number (ex. E7038%). Click <u>Q</u>uery → <u>R</u>un or F8. When the listing displays, click the position you need and click <OK> to automatically populate the window.

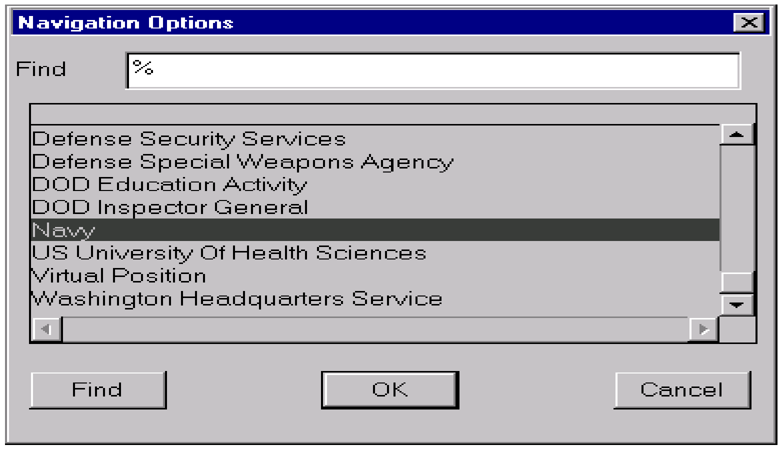


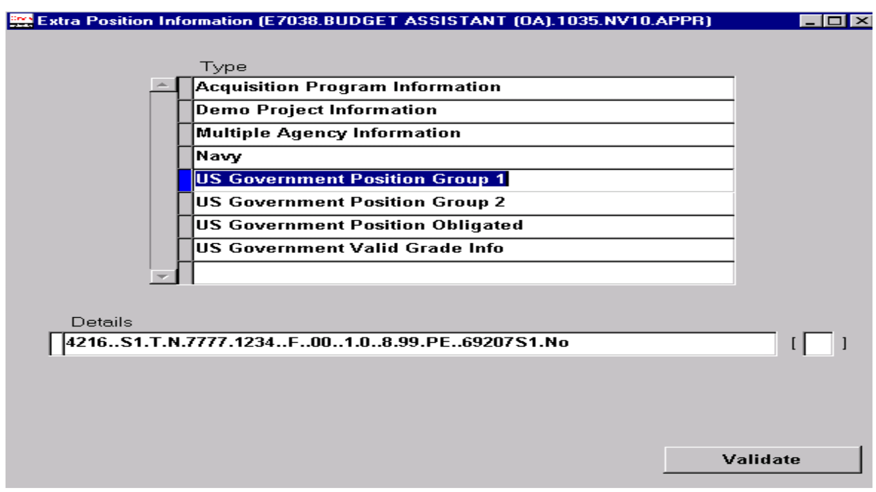
</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

Changing Competitive Level

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the Position window, click the <Others…> Taskflow Button. The Navigation Options Window displays. Click the Agency that you need, i.e. “Navy”. Click <OK>.


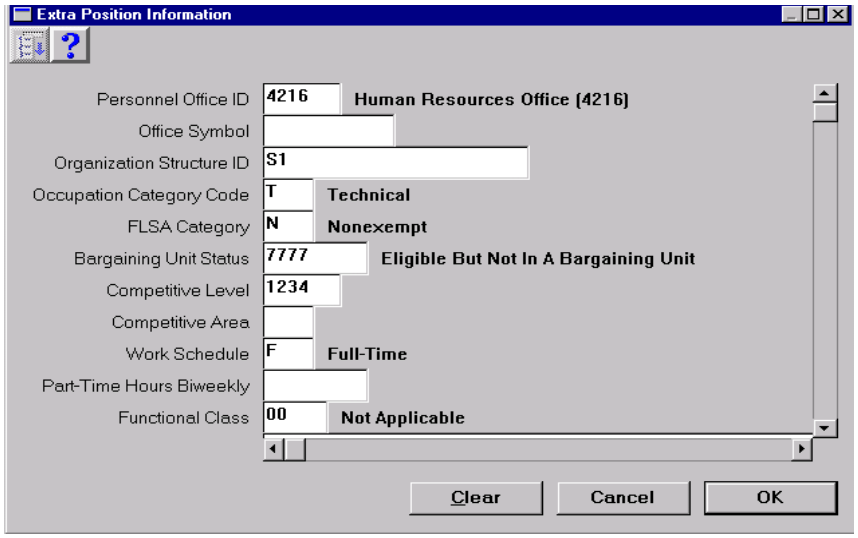
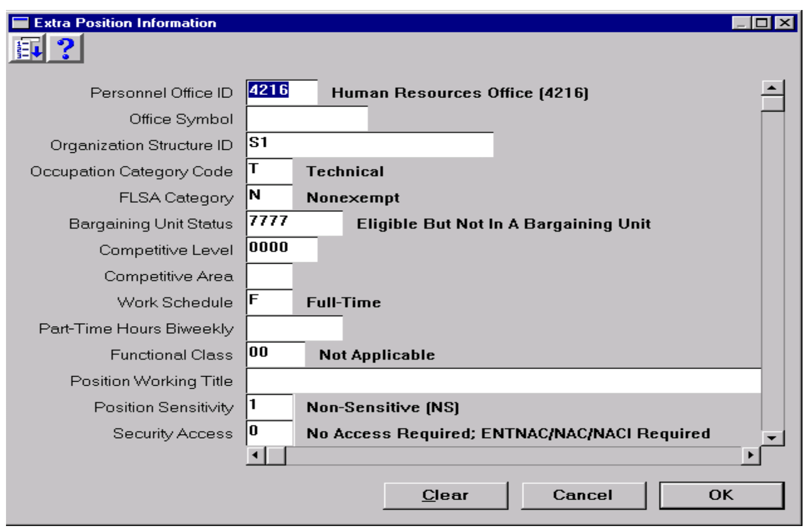
</td></tr>
<tr><td>2</td><td>The Extra Position Information Flexfield displays.
Click the appropriate flexfield, i.e., for Competitive Level. Click US Government Position Group 1.


</td></tr>
</table>

Continued on next page

Changing Encumbered Positions, Continued

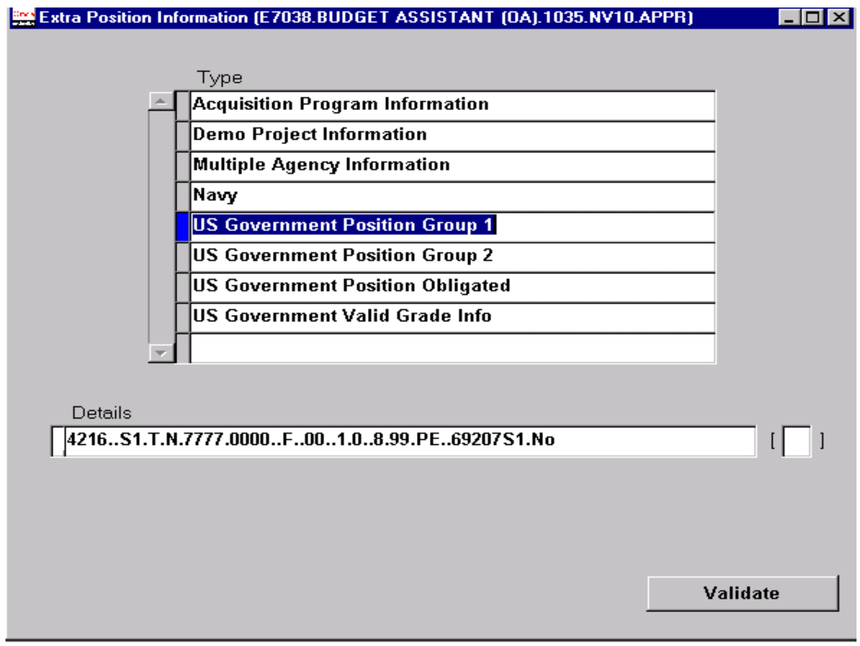
Changing Competitive Level (continued)

Step	Action
3	Click **Details**. The **Extra Position Information** Flexfield displays with previously completed information entered. 
4	Place your cursor in ***Competitive Level*** data field. Delete the current data "1234" and enter your data that is now the correct data, i.e., "0000". Click **<OK>**. 

Continued on next page

Changing Encumbered Positions, Continued

Changing Competitive Level (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>The Extra Position Information Flexfield displays with the new Competitive Level reflected in the Details box (sixth data field in the string of info = 0000).

</td></tr>
<tr><td>6</td><td>Click Save on the Toolbar.</td></tr>
<tr><td>7</td><td>The Position Window displays. If the <i>Status</i> data field says "Invalid," click <Validate> and correct any data required until the <i>Status</i> data field is "Valid."</td></tr>
<tr><td>8</td><td>To Exit, click <u>A</u>ction and click <u>C</u>lose Form to return to the Navigator List.</td></tr>
</table>

Terminating and Deleting a Position

Purpose

This section explains how to terminate or delete a position. The required steps depend on whether the position is encumbered or has been occupied.

Section Contents

- Before you begin
- Terminating a Position
- Deleting a Position

See Also

In this Module:
Chapter 1, Building Positions
Chapter 2, Managing Positions
Chapter 3, Managing Position Hierarchy

Who Does This Process

You must be assigned a role in the personnel area to perform this function or assigned this role by your Component.

Before You Begin

Things to consider before terminating or deleting a position and the differences.

When to "Terminate"	When to "Delete"
It is not encumbered.	It is not within a hierarchy.
You want to use it again.	It has never been occupied.
You want to keep historical data.	It isn't being used by an RPA.
Note: A new sequence number will be assigned.	**Note:** All historical data is removed, but the sequence number never goes away.

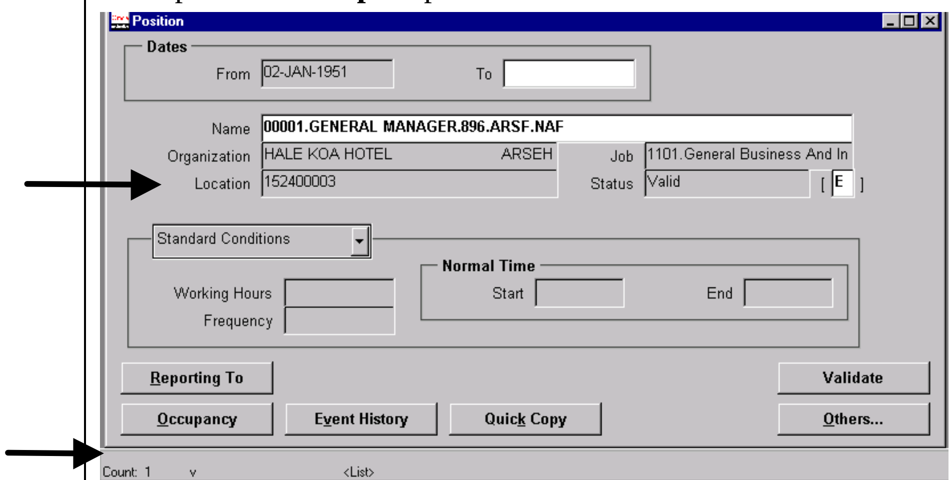
Deleting a Position

Step	Action
1	Follow this path to access the **Position** Window. On the **Navigation List** → *Work Structures* → *Position* → *Description* → <**Open**>. The **Position** Window displays.

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position (continued)

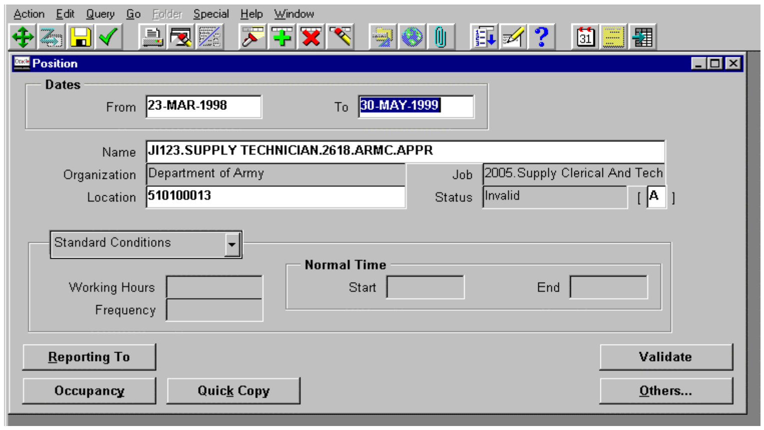
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>
Type in an end date in the To data field of the Dates Region of the position record. The date may be a past, current, or future date. Retrieve the position you wish to terminate by using the Query function on the Toolbar, (ex: JI123), as explained previously.
Note: If this date is a past or current date, you should ensure that no one is assigned against the position before you end date it. See "Before you begin" at the beginning of this section for additional information.
<u>Helpful Hint</u>: You will know the position is occupied if Location is grayed out, as well as the Message Line at the bottom of the window.
Example of an occupied position:


</td></tr>
<tr><td></td><td>Note: If the position is occupied, the system will send a daily reminder to take an action on the employee on and after the “To” Date.</td></tr>
</table>

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position (continued)

Step	Action
	Example of an Unoccupied Position (***Location*** is **not** grayed out): 
4	Click **Save**. The Message Line indicates: "Transaction complete: 1 records applied and saved."
5	Exit the **Position** Window by clicking **Action** on the Main Menu and click **Close Form** to return to the **Navigation List**.

Deleting a Position

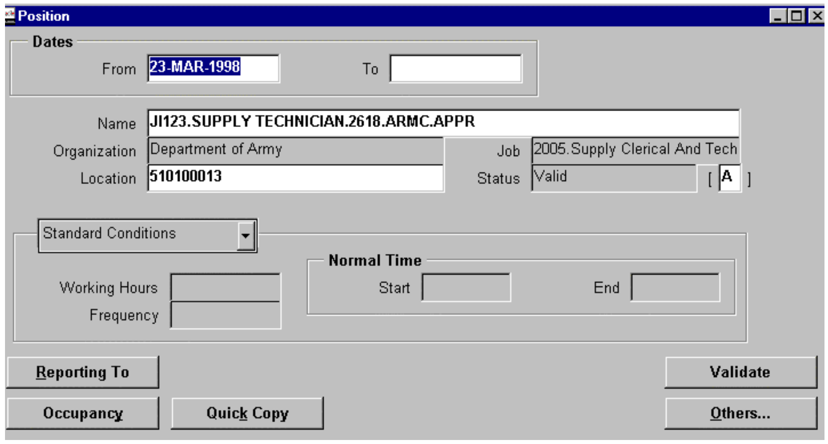
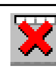
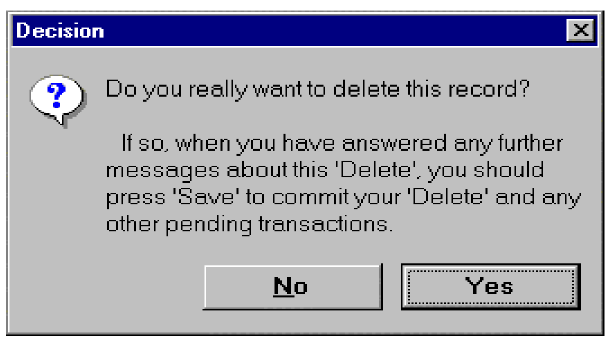
If the position is in a hierarchy, follow the process in **Deleting a Position from a Position Hierarchy** in this module. If not, follow these steps to delete a position that has never been occupied or is not being used by an RPA.

Step	Action
1	On the **Navigation List** → *Work Structures* → *Position* → *Description* → <**Open**>. The **Position** Window displays.
2	Retrieve the position you wish to delete by using the **Query** → **Enter** on the Toolbar or F7. Place the cursor in the ***Name*** data field and enter a partial value of the position, ex: %JI123%. Click **Query** → **Run** or F8.

Continued on next page

Terminating and Deleting a Position, Continued

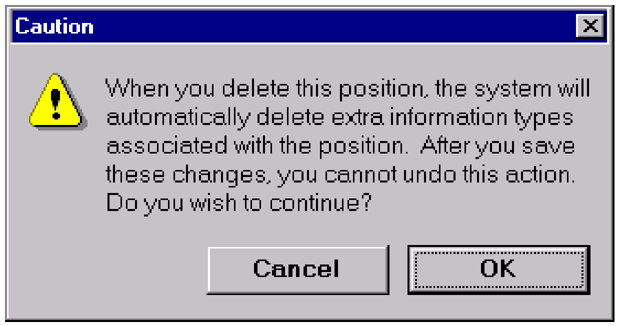
Deleting a Position (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The queried position auto populates the Position Window.

</td></tr>
<tr><td>3</td><td>Click the Delete  button on the Toolbar.</td></tr>
<tr><td>4</td><td>A Dialog Box displays asking if you really want to delete this record. Click <Yes>.

</td></tr>
</table>

Continued on next page

Terminating and Deleting a Position, Continued

Deleting a Position (continued)

Step	Action
5	A Dialog Box displays explaining the system will automatically delete extra information types associated with the position and that you cannot undo the action once it is saved:  Click <**OK**>.
6	The **Position** Window displays. A Dialog Box appears asking if you want to save changes you have made. Click **<Yes>**. 
7	A Dialog Box displays informing you: "Transaction complete: 1 records applied and saved."  Click <**OK**>.
8	Exit the **Position** Window by clicking **Action** on the Main Menu and click **Close Form** to return to the **Navigation List**.